



ENDOWMENT FUND

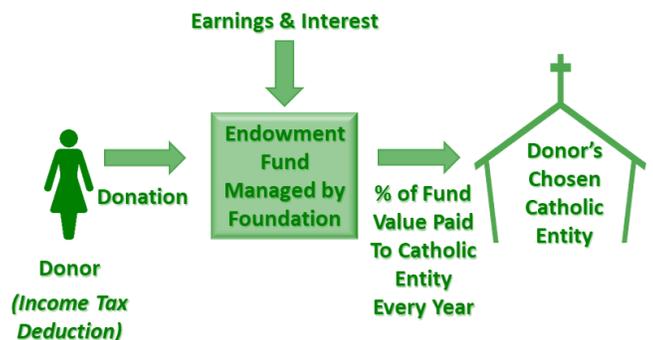
Make a Forever Gift

An Endowment Fund provides a permanent source of income to the Catholic organization of your choice. This fund is designed to function in perpetuity, making it possible for you to ensure long-term financial support and sustainability to your Parish, school, Diocese or other Catholic program or ministry about which you care. Once established, anyone can make additional contributions to the fund in any dollar amount. You can choose to support an existing endowment fund, start your own named fund, or establish a fund to honor or memorialize friends, family or other loved ones.



You can...

- Open an Endowment Fund with a minimum of \$10,000
- Designate any Catholic organization, or leave unrestricted to serve the greatest need
- Open with cash, marketable securities or other assets
- Avoid capital gains taxes on long-term, highly appreciated assets
- Make a bequest from your will or trust



Key benefits

- Provide a perpetual annual source of revenue for the Catholic entity of your choice
- Ensure your gift will always be used as you intended
- You can add to your existing Endowment Fund, or start one, with a gift or designation in your will, trust, or beneficiary designation
- Donations are invested in accordance with the United States Conference of Catholic Bishops guidelines for Socially Responsible Investments
- You can receive a reduction in income taxes



How does a **Endowment Fund** work?



MAKE A GIFT



INVESTMENT



FUND GROWTH



DISTRIBUTION

Make a gift



Donate cash or easily transfer appreciated assets (such as stock) to establish an Endowment Fund and avoid having to pay capital gains taxes while maximizing your philanthropic dollars. Or use your IRA required minimum distribution and reduce your taxable income.

Investment



Funds are invested in accordance with the United States Conference of Catholic Bishops guidelines for Socially Responsible Investments. You, and others, can continue to make additional tax-deductible contributions after the Endowment Fund is established.

Fund growth



Each year, investment earnings and interest are added to the fund balance allowing it to grow year over year.

Endowment distribution



Following the Catholic Community Foundation's distribution policy and inline with the fund agreement, a distribution is made annually to the agreed upon Catholic beneficiary.

Let's talk

About Us

The Catholic Community Foundation was established in 2004 to help donors create lasting Catholic Legacies by working with them to provide long-term support and sustainability to the programs and entities about which they care most.

Why Us

The Catholic Community Foundation offers a way to leave a legacy uniquely aligned with Catholic values and beliefs. Additionally, the Foundation invests funds in accordance with the United States Conference of Catholic Bishops guidelines for Socially Responsible Investments.